

REQUEST FOR RECORDS RETENTION SCHEDULE
To be submitted to the Records Management Division
Hall of Records CommissionSCHEDULE
NO. **185**PAGE
NO. **1.** ✓

1. Requesting Agency

STATE DEPARTMENT PUBLIC WELFARE

2. Division or Bureau of Requesting Agency

**COUNTY WELFARE BOARDS and
BALTIMORE CITY WELFARE DEPARTMENT**

3. Authorization Requested (Check only one of the squares below).

☐ **A** Dispose of present accumulation. No additional accumulation is anticipated. Records have ceased to have value to warrant retention.☒ **B** Establish retention schedule for records for which there is a continuing accumulation. The records will cease to have value to warrant their retention after the period of time indicated.☐ **C** Microfilm and destroy originals. Originals if not microfilmed would be retained for the period of time indicated.4.
Item
No.

5. Description of Records

Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation
of Hall of Records
and Board of Public
Works.1. BOARD MINUTES AND SPECIAL REPORTS TO THE BOARD

File consists of Minutes of the County Welfare Board and any special reports made to them.

RECOMMENDATION: RETAIN PERMANENTLY

2. MASTER CARD

Form No.: 311

Size: 4" x 6"

File Arrangement: Alphabetical

This card is prepared on all applicants for public welfare assistance. It shows name, address and birth date of applicant, case number, persons in household - names, birthdates, and relationship; and any references to other files regarding the applicant maintained by the office. Information on the reverse indicates the category of assistance given, dates of application, acceptance and closing, and name of case worker. The cards have long term usefulness in verifying past assistance and for recovering money from estates.

RECOMMENDATION: RETAIN PERMANENTLY

3. RECORD OF ASSISTANCE GRANTED

Form No.: 304

Size: 8 1/2" x 11"

File Arrangement: Alphabetical

Audited by: Federal, State, Internal

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7. Agency, Division or Bureau Representative

Signature

Director

Title

June 24, 1955

Date

Schedule Authorized as Indicated in Col. 6 by Hall of
Records Commission.Disposal Authorized as Indicated in Col. 6 by Board of
Public Works.7/7/55
Date

Archivist

11 1955
Date

Secretary

REQUEST FOR RECORDS RETENTION SCHEDULE

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NO. 2.

5. Description of Records

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6. Recommendation of Hall of Records and Board of Public Works.

Item No.

This ledger form shows the case number, name of recipient, and amounts of money granted and from what fund. After the case is closed and final audit made the ledger is necessary for recovery of funds and is used for statistical purposes.

RECOMMENDATION: RETAIN PERMANENTLY.

4. ADOPTION CASE RECORDS

Case records of children for whom adoption is planned by the local welfare department. Necessary information from these records is filed with the court at the time the adoption petition is filed. The records in each case include some or all of the following documents:

- 829 - Calculation of Amount
- 832 - Consent for Medical Care
Birth Verification
Court Commitment
- 839 - Financial Agreement
- 849 - Medical Report on Child - Adoption Investigation
- 852 - Report on Adoption Petition Investigation (4 sheets)
(Copy - original in Court Records)
- 830 - Child's Face Sheet
- 836 - Chronological Health Record
- MCH-7 Pediatric Health Record
- 856 - Medical Report - Child
- 857 - Follow-up Medical Report - Child
- 864 - Referral of Child - Inter-county Adoption
- 870 - Referral Summary - Psychological Service

RECOMMENDATION: RETAIN PERMANENTLY

5. MANUAL RELEASE LETTERS OF TRANSMITTAL

Size: 8½" x 11"

Manual release letters of transmittal are periodic directives of the State Department to the County Department making changes in the Procedures and Forms Manuals. The State Department maintains a complete set of Releases in its permanent records.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

6. RECOVERIES

Size: 8½" x 11"

Audited by: Federal, State, Internal

Recoveries are made from individuals who have received aid from public welfare funds, or after death, in some cases, from the recipient's

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BOARD OF PUBLIC WORKS

Date ... JUL 11 1953

Secretary

REQUEST FOR RECORDS RETENTION SCHEDULE
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4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.																																				
	<p>family or heirs. After the recovery account is closed, the supporting data to the permanent books of account are of no further value. The supporting documents are:</p> <p>347 - Record of Recoveries - Control Account 348 - Record of Recoveries - Individual Account</p> <p>RECOMMENDATION: RETAIN UNTIL ACCOUNT IS CLOSED AND THEREAFTER FOR THREE YEARS, OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY</p>																																					
7.	<p><u>CASE RECORDS</u></p> <p>Included in this item are the case records in the following categories:</p> <p>Public Assistance Agency Foster Homes Protective Service After-Care Supervision Hospital Certification Licensed Homes Service at Request of Other Agencies Local Services Adoption Homes Families of Children in Foster Care, or Adoption Service Adoption Investigation for Court</p> <p>Excluded from this item are children's records pertaining to adoption. Specifically the following listed forms as found in the case records are included:</p> <table border="1"><thead><tr><th>Form No.</th><th>Title of Form</th></tr></thead><tbody><tr><td>101</td><td>Family Group Sheet</td></tr><tr><td>102</td><td>Responsible Relative Sheet</td></tr><tr><td>103</td><td>Living Arrangement - Address</td></tr><tr><td>104</td><td>Resource - Employment</td></tr><tr><td>105</td><td>Resource - Other Monthly Money Income</td></tr><tr><td>106</td><td>Resource - Relative Support</td></tr><tr><td>107</td><td>Insurance Data</td></tr><tr><td>108</td><td>Real Property Data</td></tr><tr><td>109</td><td>Upkeep of Real Property - Shelter Cost</td></tr><tr><td>110</td><td>Resource - Property Other than Home</td></tr><tr><td>111</td><td>Residence Data</td></tr><tr><td>112</td><td>Age - Relationship - School Attendance</td></tr><tr><td>113</td><td>Deprivation of Parental Support - ADC</td></tr><tr><td>114</td><td>Home Meeting Standards - ADC</td></tr><tr><td>115</td><td>Age - OAA & APTD</td></tr><tr><td>218</td><td>Support of Dependent Child - Notification of Dependency</td></tr><tr><td>219</td><td>Support of Dependent Child - Report of Action</td></tr></tbody></table>	Form No.	Title of Form	101	Family Group Sheet	102	Responsible Relative Sheet	103	Living Arrangement - Address	104	Resource - Employment	105	Resource - Other Monthly Money Income	106	Resource - Relative Support	107	Insurance Data	108	Real Property Data	109	Upkeep of Real Property - Shelter Cost	110	Resource - Property Other than Home	111	Residence Data	112	Age - Relationship - School Attendance	113	Deprivation of Parental Support - ADC	114	Home Meeting Standards - ADC	115	Age - OAA & APTD	218	Support of Dependent Child - Notification of Dependency	219	Support of Dependent Child - Report of Action	
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Date JUL 11 1955

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REQUEST FOR RECORDS RETENTION SCHEDULE
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4. Description of Records


Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation
of Hall of Records
and Board of Public
Works.

220	Authorization to Give Case Information
222	Notification to Law Enforcement of ADC
225	Referral to Vocational Rehabilitation
262	Local Summary - Appeal Hearing
314	Certificate of Eligibility for Surplus Commodities
321	Medical Examination Record - APTD
322	Certificate of Birth Registration
323	Social Data - APTD
325	Bank Clearance
326	Medical Report
327	Request for Information Regarding Employable Persons
328	Information for GPA for Employables
335	Request to Verify Record of Birth
336	Request to Verify Record of Death
337	Calculation of Amount of Grant
338	Decision Sheet
349	Residence Certificate
384	OASI Clearance - Address of Absent Parent
385	Certificate of Data - OASI Benefits
387	Request for Federal OASI Information
393	Reimbursement Agreement - Non-Assignable Insurance
401	Application for Assistance or Other Service
430	Search of Federal Census Records
538	Affidavit as to Age of Applicant for Old Age Assistance
604	Statement of School Attendance
701	Physician's Report on Eye Examination
707	Referral for Review of Medical Report - APTD
Format	Petition for Guardianship

Case Forms - Other Services

212	Special Report of Hospital on patient who is unable to pay, but unwilling to make application for a hospital certificate
213	Information for General Hospital Care at State Expense
431	Recommendation to the Court on After Care Plan
432	Release Approval - After Care Planning
433	Progress Report to Court on After Care
848	Medical Report on Family - Adoption Investigation
849	Medical Report on Child - Adoption Investigation
852	Report on Adoption Petition Investigation (4 sheets) Copy - original in Court Records

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Date JUL 1 1953

REQUEST FOR RECORDS RETENTION SCHEDULE
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5. Description of Records

Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation
of Hall of Records
and Board of Public
Works.Forms Relating to Certification for Care at State Expense and Care
of Children

- 206 Certificate of Eligibility for Medical Services
- 210 Certificate for General Hospital Care
- 210-P.A. Certificate for General Hospital Care (Already Eligible)
- 388 Record of Financial Investigation for Admission to State Mental Hospital
- 815 Change of Status of Eligibility for Care at State Expense (other than General Hospital Care)
- 817 Certificate of Eligibility for Care at State Expense (other than General Hospital Care)
- 863 License for Care of Children
- 863-A Cancel License
- 875 Report of Action on Child Transferred from State-aid
- 881 Application for License and Family Information Sheet
- 882 Medical Report on Family Applying for License for Care of Children
- 883 Reference on Family Applying for License for Care of Children
- 884 Report for Class H License
- 901 Certificate - Chronic Hospital Care
- 903 Patient's Own Property - Chronic Hospital Care
- 904 Reconsideration - Chronic Hospital Care

Case Forms - Foster Care, Child and Child's Family Records

- 818 Purchase of Care - Referral
- 825 Purchase of Care - Private Agency Decision
- 826 Inter-County Placement - Referral of Child
- 829 Calculation of Amount - Foster Care
- 830 Child's Face Sheet
- 831 Placement Sheet
- 832 Consent for Medical Care
- 836 Chronological Health Record
- 839 Financial Agreement - Foster Care
- 854 Medical Report - Mother of Child for Adoption
- MCH-7 Pediatric Health Record
- 856 Medical Report - Child
- 857 Follow-up Medical Report - Child

Case Forms - Foster Home (Including Adoptive Home)

- 827 Inter-County Placement - Referral of Home
- 833 Application to Board Children
- 834 Medical Report on Foster Family
- 835 Foster Home Face Sheet
- 853 Application for Adoption of a Child

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4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
	<p>855 Medical Report - Adoptive Family 858 Information for Adoptive Parents 859 Re-application for Adoption of a Child 860 Placement Agreement - Foster Care 861-A Agency Foster Home Approved 862 Agency Foster Home Discontinued 865 Referral of Home - Inter-County Adoption</p> <p>RECOMMENDATION: RETAIN FOR FIVE YEARS AFTER DATE OF LAST ENTRY AND THEN DESTROY.</p>	
8.	<p><u>SOURCE CARDS</u></p> <p>Form No.: 359 Size: 8½" x 11" Audited by: Federal - State - Internal</p> <p>Source cards are used for forecasting trends in welfare assistance, obtaining average case loads, average costs, and budgetary purposes. The information on the 359 series is obtained from work sheets and statistical reports of services rendered by the County welfare boards. Each card is ruled for two years' monthly entries. (The State Department maintains Source Cards containing the same informa- tion - these are retained permanently).</p> <p>Source cards are listed below:</p> <p>SDPW 359-F (Blue) - Living Arrangements of Children in Cases Receiving Service at End of Month. SDPW 359-L (Yellow) - Number of Persons Included in Grants of Assistance. SDPW 359-M (Salmon) - General Public Assistance Employables - Status of Applications and Cases Receiving Con- tinuing Service. SDPW 359-M General Public Assistance - Status of Applications and Cases Receiving Continuing Service. SDPW 359-M (White) - Aid to Permanently and Totally Disabled - Status of Applications and Cases Receiving Con- tinuing Service. SDPW 359-M (Brown) - Public Assistance to the Needy Blind - Status of Applications and Cases Receiving Con- tinuing Service. SDPW 359-M (Green) - Aid to Dependent Children - Status of Applications and Cases Receiving Continuing Service. SDPW 359-M (Yellow) - Old Age Assistance - Status of Applica- tions and Cases Receiving Continuing Service. SDPW 359-M (White) - Aid to Permanently and Totally Disabled - Number of Individuals Assisted, Obligations In- curred and Average Grant per Individual.</p>	<p>APPROVED HALL OF RECORDS COMMISSION</p> <p>APPROVED BY BOARD OF PUBLIC WORKS Date JUL 11 1955 <i>[Signature]</i> Secretary</p>

REQUEST FOR RECORDS RETENTION SCHEDULE
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	<p>SDPW 359-O (Brown) - Public Assistance to the Needy Blind - Number of Individuals Assisted, Obligations Incurred and Average Grant Per Individual.</p> <p>SDPW 359-O (Yellow) - Old Age Assistance - Number of Individuals Assisted, Obligations Incurred and Average Grant Per Individual.</p> <p>SDPW 359-P (Green) - Aid to Dependent Children - Number of Families and Recipients Assisted, Obligations Incurred for Assistance and Average Grant Per Family, Per Recipient, and Per Child.</p> <p>SDPW 359-Q (Salmon) - General Public Assistance - Number of Cases Assisted, Obligations Incurred and Average Grant Per Case.</p> <p>SDPW 359-Q (Salmon) - General Public Assistance Employables - Number of Cases Assisted, Obligations Incurred and Average Grant Per Case.</p> <p>SDPW 359-T (Blue) - Foster Care - Number of Children for Whom Boarding Payments are Made, Obligations Incurred and Average Payment per Child</p> <p>SDPW 359-V (White) - Service at Request of Other Agency - Public Assistance, Old Age Survivor's Insurance, Selective Service Boards and Other.</p> <p>SDPW 359-V (Blue) - This form includes the following eight categories:</p> <ol style="list-style-type: none">1. Foster Care Other Than Adoption2. Foster Care, Adoption3. Protective Service for Children-Families4. Service to Parents in Relation to Foster Care5. Service to Parents in Relation to Adoption6. Adoption Investigations for the Courts7. Service-Training Schools, Supervision Families8. Service-Training Schools, Admission and Discharge Investigations. <p>SDPW 359-W (Blue) - Approved Agency Adoptive-Home Status of Applications and Cases Receiving Continuing Service (Foster Homes)</p> <p>SDPW 359-X (White) - Status of Requests for Certification for General Hospital Care.</p> <p>SDPW 359-X (White) - Status of Requests for Certification for Chronic Hospital Care</p> <p>SDPW 359-Z (White) - Status of Request for Certification for Special Type Hospital Care and Mental Hospital Care.</p>	<p>APPROVED HALL OF RECORDS COMMISSION</p> <p>RECEIVED BY BOARD OF PUBLIC WORKS Date JUL 11 1955</p> <p><i>[Signature]</i> Secretary</p>

RECOMMENDATION: RETAIN FOR THREE YEARS AFTER DATE OF LAST ENTRY, AND THEN DESTROY.

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No. | 5. Description of Records
Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period. | 6. Recommendation of Hall of Records and Board of Public Works. |
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9. STATISTICAL RECORDS

Audited by: Federal and Internal

Explanation of Abbreviations:

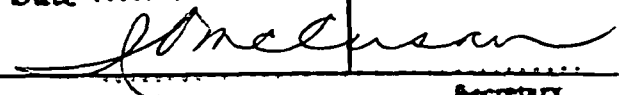
OAA - Old Age Assistance
ADC - Aid to Dependent Children
PANB - Public Assistance to the Needy Blind
APTB - Aid to Permanently and Totally Disabled
GPA - General Public Assistance
OASI - Old Age Survivors Insurance

Statistical records are necessary for budget purposes, trend forecasts, work load distribution, and distribution of administrative costs. Statistical information is forwarded to the State Department in detail or summary form according to procedure directives. The following records are included in this item:

- 63 Semi-annual Report - Concurrent Receipt OAA-OASI
- 64 Semi-annual Report - Concurrent Receipt ADC-OASI
- 217 Monthly Report of Caseload Coverage
- 234 Daily Report of Number of Interviews
- 235 Special Report of Number of Interviews
- 236 Report of Reasons for Making Grants of Assistance
- 237 Report of Reasons for Not Making Grants of Assistance
- 238 Report of Reasons for Canceling Grants of Assistance
- 250 Monthly Statistical Report of Services (4 sheets)
- 252 Statistical Card - Receiving Assistance
- 253 Statistical Card - Agency Home
- 254 Statistical Card - Child in Foster Care
- 255 Statistical Card - Receiving Other Service
- 256 Notice of Request Received and Disposition of Application Made
- 257 Notice of Change in Case Receiving Continuing Service
- 258 Reconsideration Route Slip
- 300 Case Change - Protective Services (Baltimore City only)
- 313 Report of Cases Eligible Awaiting Funds
- 360 Correction of Monthly Statistical Report
- 366 Report on Need Due to Unemployment
- 380 Monthly Report - Effect of Changes in OASI
- 503 Report on Distribution of Assistance Grants - OAA and PANB
- 603 Report on Distribution of Assistance Grants - ADC (5 sheets)

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Date JUL 11 1955



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REQUEST FOR RECORDS RETENTION SCHEDULE
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4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
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| 807 | Monthly List of Children for Adoption | RECOMMENDATION: RETAIN FOR THREE YEARS AFTER DATE OF LAST ENTRY OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY. |
| 808 | Monthly List of Prospective Adoptive Families | |

10. CORRESPONDENCE

Correspondence concerned with the functions of the office - it is with individuals, Federal, State, and local agencies, civic groups, etc.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

11. ACCOUNTING RECORDS

Audited by: Federal and Internal

Although the State Department handles all financial matters for the County Departments, some of the County records are needed for audit. This item includes the following records maintained by the County Departments:

<u>Form No.</u>	<u>Title of Form</u>
8	Expense Account
56	Requisition for Supplies or Equipment
57	Statement to Employee - Earnings
301	Payroll for Assistance
302-1	Report of Obligations
302-1A	Supplement to Monthly Financial Report
302-1B	Detail of Obligations for Administration
302-2	Cash Account Reconciliation
303-1	Report of Net Expenditures and Source of Funds
303-2	Analysis of Unexpended Balance
305	Summary of Authorization for Assistance
305-A	Authorization for Payment for Services or Purchases- Foster Home Program
306	Eligible Awaiting Funds
307	Voucher
308	Notice of Closing - Assets for Recovery
309	Authorization to Draw Check
310	Authorization of Payment
312	Authorization & Invoice for Services
316	Record of Toll Calls
341	Petty Cash Voucher
343	Insufficient Endorsement
351	Report of Recoveries
352-A	Age Record - (Aid to Dependent Children)

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REQUEST FOR RECORDS RETENTION SCHEDULE
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4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
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352-B Age Record - (Aid to Dependent Children) (By date)
353 Levy Request
354 Request for Advance of Funds from County Commissioners
355 Certification of Local Appropriation
356 Receipt Form
357 Advice of Refund
362 Estimate of Caseload & Expenditures - Old Age Assistance, Aid to Dependent Children, Public Assistance to Needy Blind (4 sheets)
364 Estimate of Expenditures for Assistance Programs
364-A Expenditures for Assistance Programs
364-B Expenditures for Assistance Programs
837 Statement of Payment Due for Foster Care
838 Summary of Financial Plan - Foster Care
840 Notice of Financial Plan - Foster Care
State of Maryland Payroll Form

SD PW 130

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDIT, WHICHEVER IS LATER, AND THEN DESTROY.

12. PERSONNEL RECORD CARD
PAYROLL RECORD CARD

Size: 5" x 8"
File Arrangement: Alphabetical
Audited by: Federal, State, Internal

The personnel record card (No. 322) shows employee's name, address, department where employed, marital status, and chronologically all changes in employment classification and salary. On the reverse is the record of leave shown by month; this is ruled for four years monthly entries.

The payroll record card shows employee's name, address, retirement system number, classification, salary, and deductions. The reverse shows the bi-weekly earnings and withholding tax. The card is ruled for three years entries.

RECOMMENDATION: RETAIN WHILE EMPLOYED AND FOR THREE YEARS THEREAFTER, THEN DESTROY.

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APPROVED BY
BOARD OF PUBLIC WORKS
Date JUL 11 1955.

[Signature]
Secretary

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4. Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

5. Description of Records

6. Recommendation of Hall of Records and Board of Public Works.

13. PERSONNEL FOLDERS

An individual folder for each employee is maintained. The following records may be included in each folder:

203 Request for Field Work Placement
211 Notification to Report for Physical Examination
SEC 101 Application for State Employment
SEC 102 Application for State Employment
SEC 121 Charges and Specifications (2 sheets)
SEC 122 Doctor's Certificate
SEC 131 Certification of Applicant for Public Employment
SEC 133 Report of Unsatisfactory Services
ERS 7 Change of Beneficiary
ERS 9 Application for Ordinary Disability Retirement
ERS 10 Employee's Statement of Disability
ERS 11 Physician's Report of Disability
ERS 13 Application of Member for Return of Accumulated Contributions
SFI Employer's First Report of Injury and all other State Industrial Accident Commission and State Accident Fund Records which may be in the folder.

RECOMMENDATION: RETAIN WHILE INDIVIDUAL REMAINS EMPLOYED AND FOR FIVE YEARS THEREAFTER, THEN DESTROY.

14. PERSONNEL RECORDS

Personnel records not in the employee folders and which have no long term value are:

42 Request for Establishing New Position (Baltimore City only)
43 Request for Change in Position (Baltimore City only)
44 Notice of Addition to Payroll (Baltimore City only)
45 Notice of Change in Personnel (Baltimore City only)
47 Request for Vacation
128 Monthly Leave Report
368 Weekly Report of Attendance
SEC 5-A Recommendation to Deny Salary Increment
SEC 109 Report of Changes in Personnel
SEC 126 Report of Vacancy
SEC 130 Request for Temporary Appointment
ERS 1 Enrollment Card - Retirement System
ERS 2 Employees' Copy of Enrollment Card

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

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Date **11 11 1955**

Secretary